



KID INSIGHT

Content vs. devices: What reigns supreme?

Device ubiquity means mobile phones and tablets are losing their luster. Consulting firm Smarty Pants breaks down what's still holding kids' attention.

By Kidscreen Staff March 5, 2019

By: Mara Singer

The TV in my pocket

Across platforms and devices, there are millions of videos, shows and movies that create endless entertainment options for kids. It is one of the many reasons viewing continues to dominate kids' digital leisure time.

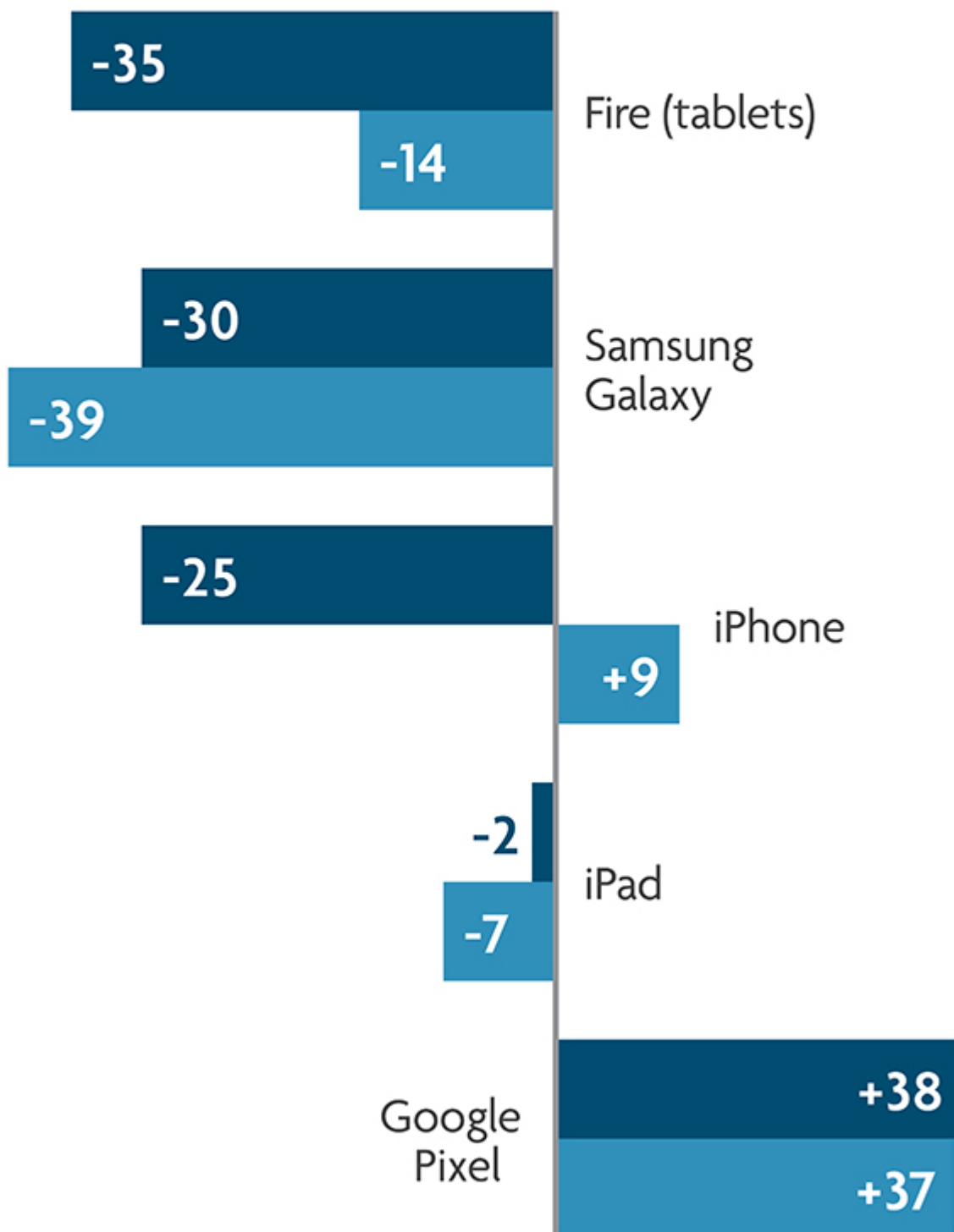
Yet the devices on which they are consuming content have started to lose their luster. Despite (or perhaps because of) heavy usage, smartphone and tablet brands no longer evoke the same affinity and cool factor as they did a few years ago, according to the latest Brand Love study from Smarty Pants. With countless touchpoints at home and in school, mobile devices have shifted from novelty to commodity, and are now viewed simply as portals to entertainment—much like the living room TV.

Waning excitement is evident in Kidfinity scores—Smarty Pants' proprietary measure of brand awareness, appeal and popularity among six- to 12-year-olds. Newcomer Google's Pixel is the exception, rising 38 Kidfinity points. Apple's iPad and iPhone, meanwhile, continue to lead the category, but dips in kid love and popularity mean Kidfinity scores are softening for the products.

This trend exists across age groups, but it is more pronounced among younger kids ages six to eight, for whom owning iPhones and iPads is a rite of passage.

Change in Kidfinity for select device brands

(by age group, 2018)



 Kids 6 to 8 Kids 9 to 12

The king of content

YouTube continues to reign as the number-one kids entertainment brand, a spot it has held onto since 2016. The omnipresent platform plays a central role in shaping the evolving behavior of kids. The brand gained an additional 10 Kidfinity points in 2018 among six- to 12-year-olds, reaching an all-time high score of 910. And it shows no signs of slowing down.

With more than 400 hours of new content uploaded every minute (according to Brandwatch), kids can always find something new on YouTube.

The viewing leader maintains its position as the number-one brand that kids consider to be “really popular now.” At the same time, brand awareness, love and use all reached new heights in 2018.

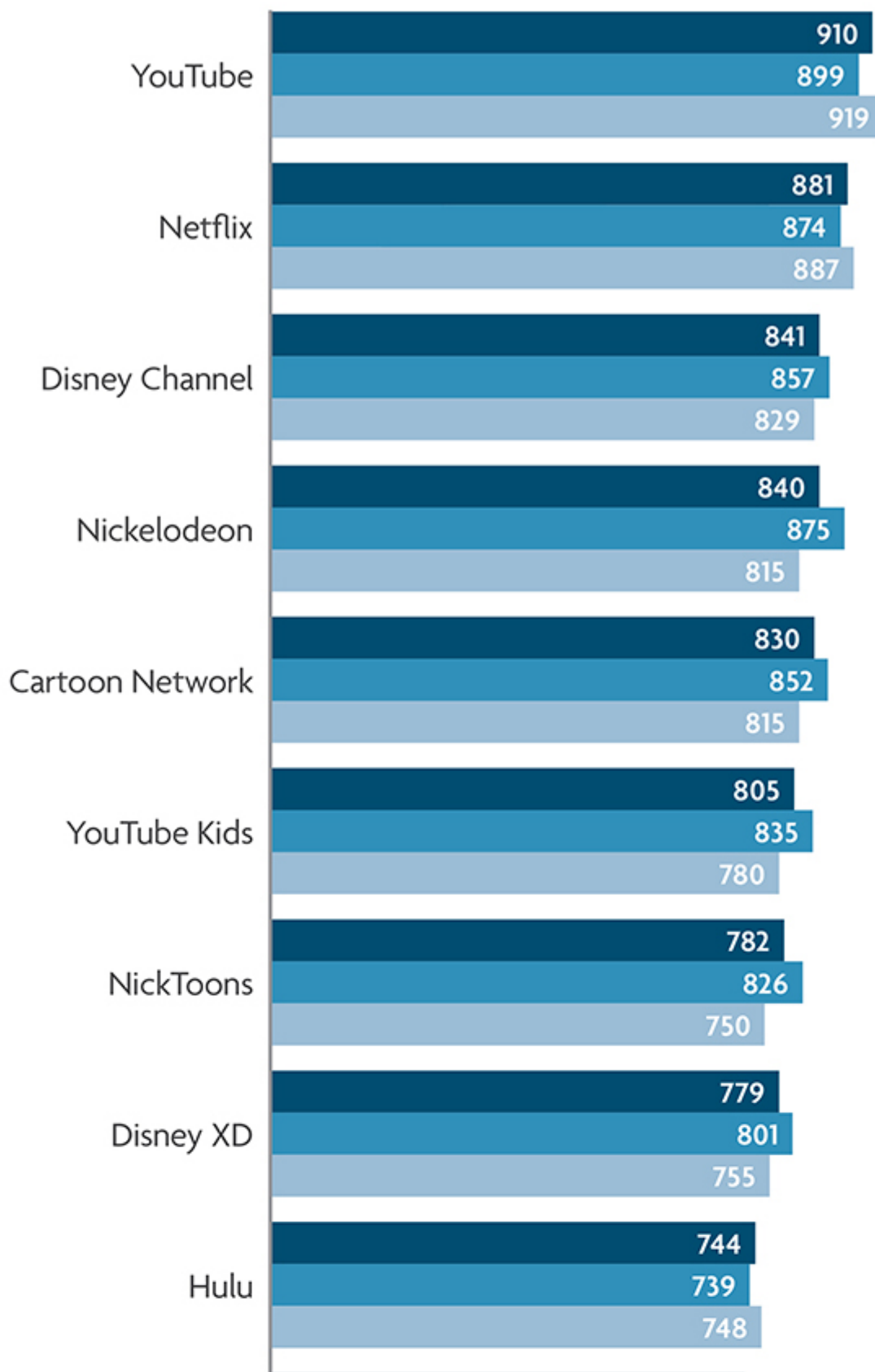
While nearly every kid (98%) uses YouTube on a weekly basis, the platform has started to lose traction among parents. It dropped 16 Parentfinity points to a score of 851 and fell to 23rd, from 10th, on parents’ list of most popular network and streaming platforms in 2018. (The biggest decline occurred with parents of younger boys, among whom the brand dropped 38 points and moved to 54th, from 14th.) Parent love for the platform also declined to 53% last year, from 58% in 2017.

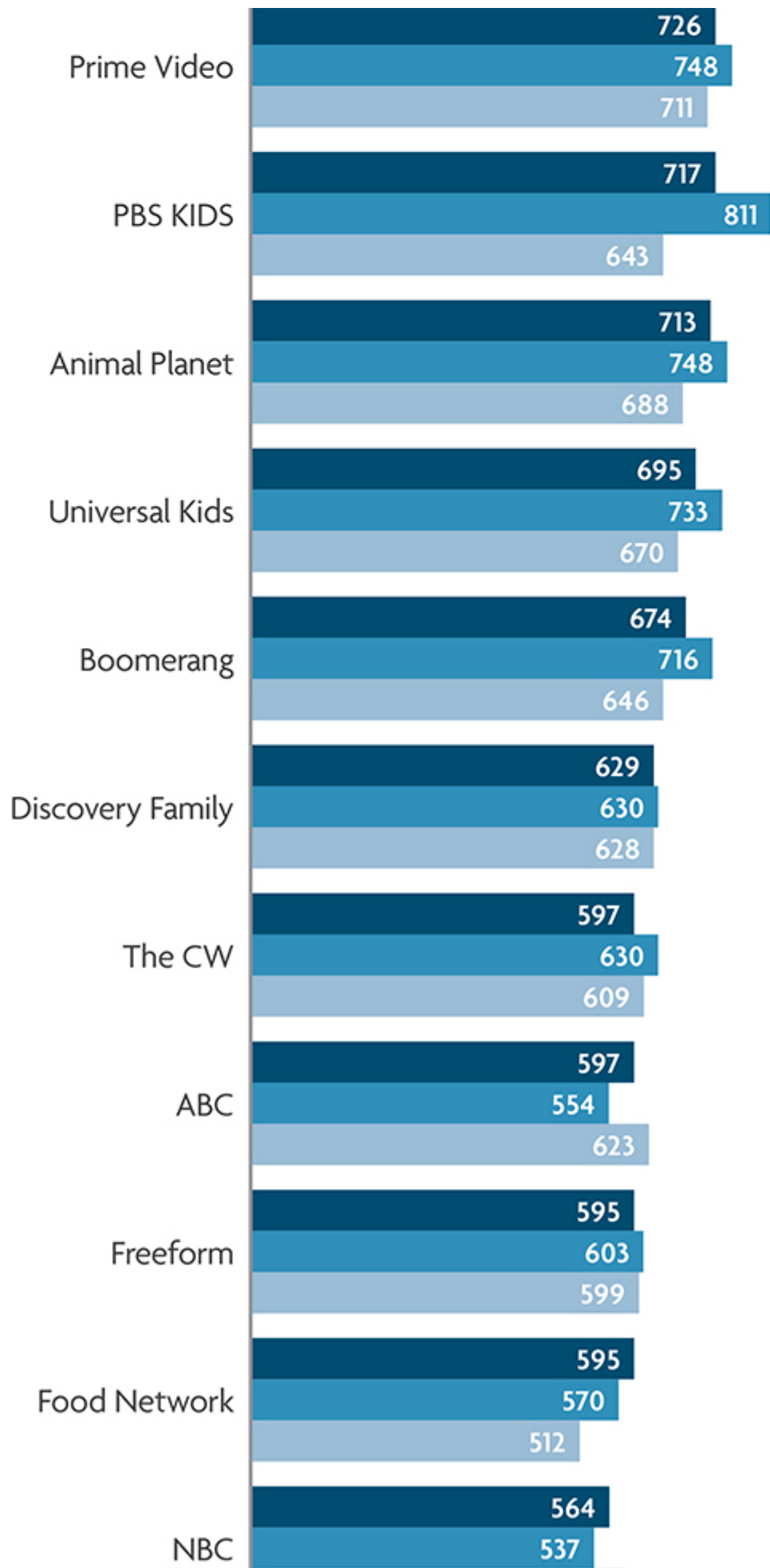
As inappropriate content and cyber safety remain major concerns, fewer parents consider YouTube to be a brand that is age-appropriate for their kids, and more say it is for older kids—a sign that parent trust is weakening.

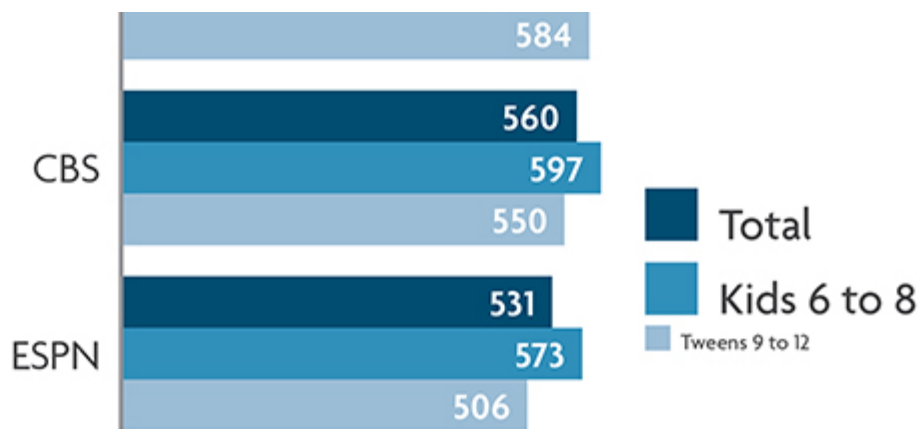
The YouTube Kids app is the powerhouse’s attempt to address growing parental concerns for the younger crowd. But while kid awareness of the brand grew to 90%, from 85% in 2018, and kid love surpassed the halfway mark at 52% (up from 48% in 2017), the app is perceived as too juvenile by tweens.

An update last September introduced a new mode through which parents can select an “older” profile geared toward eight- to 12-year-olds, but the jury’s still out on whether adding a bit more music and gaming content will be enough to improve appeal and popularity among tweens.

Kidfinity for select network and streaming platforms (by age group, 2018)







The stream team

While YouTube super-serves all of kids' short-form content needs, long-form streaming platforms continue to gain favor with youth.

As kids increasingly turn to cable alternatives to watch their favorite shows, Netflix, Hulu and Amazon Prime Video have been gaining momentum with kids. In addition to familiar content acquisitions, each of these streaming providers has invested heavily in original programming over the last few years, and 2018 marked each platform's highest Kidfinity score to date.

In addition to the mainstream content providers, kids and families are watching video-game streams on Twitch, influencers on IGTV, and originals on Facebook Watch. Families can now subscribe to a DC Universe service and a new Vudu-branded service from Walmart. And this year will also bring an influx of new SVOD platforms from Apple, Disney and WarnerMedia.

The result—cord-cutters and cord-nevers are increasing daily. In fact, more than 20% of the US population will be without traditional pay-TV by 2022, according to online market research portal Statista. For more than 33 million households, over-the-top solutions already make it easy to skip the average \$100-plus monthly cable or satellite bill.

The content and distribution mediascape is evolving at a rapid pace, and kids' and families' viewing behaviors are changing as a result. The landscape will likely look different a year from now, but there's no doubt kids will still be tuned in.

Mara Singer is an insights brainiac at Smarty Pants, a youth and family research and consulting firm. For more information, contact Meredith Franck at 914-939-1897 or visit asksmartypants.com.

Kidfinity and Parentfinity are proprietary composite measures of brand awareness, love and popularity. They are derived from Smarty Pants' Brand Love study—an annual brand equity tracking study conducted online among a representative sample of US households with children ages six to 12. In 2018, 8,904 children and their parents evaluated 379 consumer brands across 19 categories as part of the two-month study.